



County of Los Angeles CHIEF EXECUTIVE OFFICE

Kenneth Hahn Hall of Administration
500 West Temple Street, Room 713, Los Angeles, California 90012
(213) 974-1101
<http://ceo.lacounty.gov>

WILLIAM T FUJIOKA
Chief Executive Officer

Board of Supervisors
GLORIA MOLINA
First District

MARK RIDLEY-THOMAS
Second District

ZEV YAROSLAVSKY
Third District

DON KNABE
Fourth District

MICHAEL D. ANTONOVICH
Fifth District

June 22, 2011

To: All Department Heads

From: William T Fujioka
Chief Executive Officer

MASTER AGREEMENT FIRMS FOR AS-NEEDED PROCESS IMPROVEMENT SERVICES

This memorandum advises of the addition of 15 firms to the Master Agreement for As-Needed Process Improvement Services (Master Agreement), which the Board adopted on June 15, 2010. The Master Agreement firms can provide as-needed process improvement consulting services to County departments, enabling them to enhance efficiency and productivity, reduce costs, and enhance services to our constituents.

Addition of Firms

Consistent with the Board's action of June 15, 2010, authorizing this Office to add additional qualified consultants to the Master Agreement, we accept proposals from firms on an ongoing basis and evaluate their qualifications and compliance with the initial Request for Statement of Qualifications requirements. The following consulting firms have now been included as Master Agreement consultants:

- A2Q2
- Bronner Group
- Business Advantage Consulting
- Ex-Big 5 Consultants
- Forman Consulting
- Holarchy Consulting Services
- ICMI
- KH Consulting
- Macias Consulting Group
- MGT of America
- PA Consulting Group
- Plus Delta Consulting
- RNR Consulting
- Sjoberg Evashenk Consulting
- Zucker Systems

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To All Department Heads
June 22, 2011
Page 2

Please note that the contact information for these firms is included in the complete list of all current Master Agreement Consultants (Attachment I). All of the Statement of Qualifications (SOQs) are maintained by this Office and available for your review. You may utilize the services of these firms consistent with the procedures issued in a memorandum dated December 13, 2010 (Attachment II).

Should you have questions regarding this memorandum, please let me know, or your staff may contact Master Agreement Program Administrator, James Hazlett at (213) 974-1148, or jhazlett@ceo.lacounty.gov.

WTF:EFS:MKZ
FC:JH:ib

Attachments (2)

c: Administrative Deputies
 Contract Managers Network

**COUNTY OF LOS ANGELES
CHIEF EXECUTIVE OFFICE
MASTER AGREEMENT FIRMS FOR
AS-NEEDED PROCESS IMPROVEMENT SERVICES**

UPDATED JUNE 17, 2011

A2Q2 Corporation

Kim Le, CEO
A2Q2 Corporation
303 Twin Dolphin Drive, Suite 600
Redwood City, CA 94065

Altmayer Consulting, Inc.

Christina Altmayer, President
600 Carroll Way
Pasadena, CA 91107

Arroyo Associates, Inc.

Nicholas Conway, President
3452 E. Foothill Blvd., Suite 910
Pasadena, CA 91107

Bronner Group, LLC

Gila J. Bronner, President and CEO
120 N. LaSalle St., Suite 1300
Chicago, IL 60602

Business Advantage Consulting, Inc.

Duane Cheney, President, CEO
Business Advantage Consulting, Inc
101 Parkshore Drive, Suite 100
Folsom, CA 95630

CCI - Human Capital Consulting, Inc.

Diane Sanders, Managing Partner
6601 Center Drive West, Suite 500
Los Angeles, CA 90045

Cambria Solutions

Diana Lee, L.A. Practice Lead
515 S. Flower Street, 36th Floor
Los Angeles, CA 90071

Ex-Big 5 Consulting

William E. Vorhies, President
Ex-Big 5 Consultants, LLC
1515 Falling Star
Westlake Village, CA 91362

Forman Consulting

Susan Forman, Principal
3730 E. Fifth Street
Long Beach, CA 90814

GCAP Services, Inc.

Ed Salcedo, President
3525 Hyland Avenue, Suite 260
Costa Mesa, CA 92626

Holarchy Consulting Services, LLC

1940 N. Highland Avenue #18
Los Angeles, CA 90068

Huskey & Associates

Bobbie L. Huskey, President
1417 W. Berteau Avenue
Chicago, IL 60613

ICMI – International Customer Management Institute

Robert Mills, Sales Director
102 S. Tejon Street, Suite 1200
Colorado Springs, CO 80903

KH Consulting Group

Gayla A. Kraetsch Hartsough, Ph.D.
1901 Avenue of the Stars, Suite 1900
Los Angeles, CA 90067

MGT of America, Inc.

Michelle Juarez, Chief Financial Officer
2001 P Street, Suite 200
Sacramento, CA 95811

MTG Management Consultants, LLC

Joseph D.K. Wheeler, CEO
1111 Third Avenue, Suite 3010
Seattle, WA 98101

Macias Consulting Group

Denise Callahan, Partner
515 S. Figueroa, Suite 325
Los Angeles, CA 90071

Matrix Consulting Group

Richard Brady, President
721 Colorado Avenue, Suite 101
Palo Alto, CA 94303

PA Consulting Group

Nick Owen
PA Consulting Group, Inc.
Two California Plaza, 350 Grand Avenue, Suite 1600
Los Angeles, CA 90017

Plus Delta Consulting

Jeremy S. Lurey, PHD
Plus Delta Consulting, LLC
10940 Wilshire Blvd., Suite 1600
Los Angeles, CA 90024

RNR Consulting

Holly Julius
RNR Consulting, MBE
1111 Superior Ave., Suite 1330
Cleveland, OH 44114

The Resources Company

Davis R. Schwartz, Senior Principal
560 Dewey Boulevard
San Francisco, CA 94116-1427

Sjoberg Evashenk Consulting, Inc.

Marianne P. Evashenk, President
Sjoberg Evashenk Consulting, Inc.
455 Capitol Mall, Suite 700
Sacramento, CA 95814

Strategica

David Howe, President
704 228th Avenue NE, #415
Sammamish, WA 98074

ThirdWave Corporation

Roy Hernandez, President/CEO
11400 W. Olympic Blvd., Suite 200
Los Angeles, CA 90064

Woolpert

Scott Cattran, Vice President
116 Inverness Drive East, Suite 105
Englewood, CO 80112-5125

Zucker Systems / West Coast Publishers

Paul Zucker
3038 ½ Udall Street
San Diego, CA 92106



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500 West Temple Street, Room 713, Los Angeles, California 90012
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WILLIAM T FUJIOKA
Chief Executive Officer

December 13, 2010

To: All Department Heads

From: William T Fujioka
Chief Executive Officer

Board of Supervisors
GLORIA MOLINA
First District

MARK RIDLEY-THOMAS
Second District

ZEV YAROSLAVSKY
Third District

DON KNABE
Fourth District

MICHAEL D. ANTONOVICH
Fifth District

MASTER AGREEMENT FOR AS-NEEDED PROCESS IMPROVEMENT SERVICES

On June 15, 2010, the Board of Supervisors (Board) approved a Master Agreement for as-needed process improvement services, including approval of 12 consulting firms selected through a Request for Statement of Qualifications process. This non-exclusive Master Agreement is available as a resource to departments to streamline the process for securing consultant assistance for process improvement services. Approved consulting firms are available to assist departments in improving efficiency and productivity, reducing costs, and enhancing services to our constituents.

Attachment I is a copy of the Board letter that provides the list of approved Master Agreement firms. Copies of all Master Agreement firms' qualifying proposals will be maintained in this Office and available for departmental review to assist in determining which Master Agreement firm might best meet specific needs. Each proposal includes information on approach/methodology, staff qualifications, related experience, and fees.

The following are major elements of the approved Master Agreement for your information:

- Although the contracting process has been streamlined, it is still a competitive process. Departments are required to issue a Request for Services (RFS) to at least three eligible Master Agreement firms. The RFS must describe the specific departmental project in detail and set forth the submission requirements and the proposal evaluation criteria developed by the department.
- Departments will then select the firm most appropriate for the department's needs and recommend the Work Order for CEO approval. Any Work Order exceeding \$300,000 will require written notice to the Board at least one week prior to submission for CEO approval. Upon CEO approval, the County's Purchasing Agent will issue the corresponding Purchase Order.

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- No work is guaranteed to any Master Agreement firm based on inclusion on the Master Agreement list.
- While this Office will administer the overall Master Agreement program, departments will be responsible for managing and monitoring the Work Order with selected firm.

Attachment II provides general guidelines for use of the Master Agreement and includes the following:

- Exhibit A - Sample RFS;
- Exhibit B - Work Order Form Template;
- Exhibit C - Master Agreement Checklist;
- Exhibit D - Template Notice of Intent to Issue Work Order Exceeding \$300,000; and
- Exhibit E - Services Evaluation form.

A Process Improvement Master Agreement Website will be available soon on the County Intranet and will include the aforementioned documents in electronic format, as well as additional information and forms.

The Master Agreement Program Administrator is Jerry Ramirez of this Office. Please let me know if you have any questions, or your staff may contact Mr. Ramirez at 213.974.4282, or via email at jramirez@ceo.lacounty.gov.

WTF:ES:MKZ
FC:JR:ib

Attachments (2)



WILLIAM T FUJIOKA
Chief Executive Officer

County of Los Angeles CHIEF EXECUTIVE OFFICE

Kenneth Hahn Hall of Administration
500 West Temple Street, Room 713, Los Angeles, California 90012
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ADOPTED

BOARD OF SUPERVISORS
COUNTY OF LOS ANGELES

#11 JUNE 15, 2010

Sachi A. Hamai
SACHI A. HAMAI
EXECUTIVE OFFICER

Board of Supervisors
GLORIA MOLINA
First District

MARK RIDLEY-THOMAS
Second District

ZEV YAROSLAVSKY
Third District

DON KNABE
Fourth District

MICHAEL D. ANTONOVICH
Fifth District

June 15, 2010

The Honorable Board of Supervisors
County of Los Angeles
383 Kenneth Hahn Hall of Administration
500 West Temple Street
Los Angeles, CA 90012

Dear Supervisors:

RECOMMENDATION TO AWARD MASTER AGREEMENT FOR AS-NEEDED PROCESS IMPROVEMENT SERVICES

(ALL SUPERVISORIAL DISTRICTS) (3 VOTES)

SUBJECT

This is a recommendation to establish a non-exclusive Process Improvement Services Master Agreement to be administered by the Chief Executive Office. The Master Agreement will provide as-needed process improvement consulting services to County departments, enabling them to enhance efficiency and productivity, reduce costs, and enhance services to our constituents.

IT IS RECOMMENDED THAT YOUR BOARD:

1. Approve and authorize the Chief Executive Officer to sign a non-exclusive Process Improvement Services Master Agreement with each of the 12 firms listed on Attachment I, in a format substantially similar to the sample Agreement provided in Attachment II, which has been approved as to form by County Counsel, effective upon Board approval through June 30, 2017.
2. Authorize the Chief Executive Officer to sign a Process Improvement Services Master Agreement with additional firms during the ensuing seven-year period that meet all minimum requirements and qualifications as outlined in the initial Request for Statement of Qualifications dated January 15, 2010.

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3. Authorize the County's Purchasing Agent to execute Purchase Orders for services for Process Improvement Services Master Agreement firms, as requested and appropriately documented by individual departments with Chief Executive Office approval, up to the amount budgeted by the requesting department for such services.
4. Authorize the Chief Executive Officer to execute amendments to the Process Improvement Services Master Agreement for any change that does not materially affect the scope of work or any other term or condition included in this agreement, and as long as the amendments do not exceed the maximum term for the Master Agreement, are consistent with the original Board-imposed intent of the Master Agreement, and are in conformance with any mandatory or otherwise Board-ordered contract provisions.

PURPOSE/JUSTIFICATION OF RECOMMENDED ACTION

In an effort to provide more efficient and cost-effective services, the County must look for new ways to streamline processes and reduce operating expenses, while maintaining the same levels of service to its constituents. In May of 2009, the Efficiency Initiative was launched by the Chief Executive Officer, instructing each County department to form an efficiency team, with the goals of identifying ways to save money, streamline processes, and reduce operating costs. While the Efficiency Initiative has resulted in over \$145 million in annual savings for the County, opportunities for further process improvements and elimination of waste should be continually explored.

Establishment of a Process Improvement Services Master Agreement (Master Agreement) with experienced firms will allow departments to achieve greater levels of efficiency, reduce or eliminate redundant processes, decrease service response times, and improve employee morale based on best practices and tracked metrics.

Implementation of Strategic Plan Goals

The recommended actions support the County's Strategic Plan Goal One of Operational Effectiveness. As described above, the services proposed within the Master Agreement would allow departments to maximize the effectiveness of their processes, structure, and operations to support timely delivery of customer-oriented and efficient public services. The Master Agreement process will also allow departments to expedite the solicitation process for these services.

FISCAL IMPACT/FINANCING

The Master Agreement does not include any appropriation. Departments will fund any services acquired from a Master Agreement consultant within the department's approved budget. As the administrator of the Master Agreement, the Chief Executive Office (CEO) will confirm and validate that funding is available before the individual Work Order is executed.

FACTS AND PROVISIONS/LEGAL REQUIREMENTS

The Master Agreement has been approved as to form by County Counsel and includes all of the Board's required contract provisions including those pertaining to compliance with the County's Child Support Program, consideration of GAIN participants for employment, adherence to County's Defaulted Property Tax Reduction Program, and Jury Service requirements. The proposed Master Agreement is not subject to the County's Living Wage Program.

Program Administration

The CEO will act as the County's Master Agreement Program Administrator and will provide overall direction and oversight for the program. The CEO will maintain copies of the Statement of Qualifications (SOQ) submitted by Master Agreement firms for departmental staff to review when considering a solicitation and issuance of a Request for Services.

With your Board's approval, the CEO will accept and evaluate qualifications from additional firms that request their inclusion on the Master Agreement List. Such firms may be added to the Master Agreement if they meet the initial Request for Statement of Qualifications' (RFSQ) requirements. Your Board and County departments will be advised when additional firms are added to the list. Information about the Master Agreement, the requirements and the opportunity to submit qualifications will be posted on the County's Website.

County Departments' Utilization of the Master Agreement

The proposed Master Agreement provides a non-exclusive list of pre-qualified firms that have demonstrated relevant experience and staff capacity to provide the requested services. The list of firms will be a resource to departments and thereby streamline their process for selecting contract assistance, if desired. Departments interested in contracting with a Master Agreement firm will issue a Request for Services (RFS) to at least three Master Agreement firms. The RFS will describe the specific departmental

The Honorable Board of Supervisors

June 15, 2010

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project in detail, set forth the submission requirements and the proposal evaluation criteria. Departments will evaluate responses, select the firm most appropriate for the department's needs, and recommend the Work Order for CEO approval. If the Work Order exceeds \$300,000, departments shall be required to provide written notice to your Board, at least one week prior to submission of recommended Master Agreement firm to the CEO. Upon CEO approval, the County's Purchasing Agent will issue the corresponding Purchase Order. No work is guaranteed to any Master Agreement firm based on the award of a Master Agreement.

Each department that decides to contract with a Master Agreement firm will designate a Project Director. The Project Director will be responsible for 1) issuing an RFS to at least three Master Agreement firms indicated above, requesting submission of a proposal to provide specified services; 2) managing the proposal evaluation and contractor selection process, including issuance of a requisition to the Purchasing Agent for a Purchase Order for the services; 3) monitoring the contractor's performance and progress on the project; 4) reviewing and approving project tasks, deliverables, and invoices, and; 5) providing direction to the contractor in the areas relating to County policy, information requirements and procedural requirements.

Each contractor will provide services as an independent contractor and will be responsible for the means and methods of performing the specialized services and accomplishing the results and deliverables requested by the County pursuant to the Master Agreement.

The Project Director will provide performance reports to the Master Agreement Program Administrator, as appropriate. When contract services have been completed, the Project Director will complete and submit a Services Evaluation form to the Master Agreement Program Administrator. These forms will be kept on file for other departments to view in considering new solicitations.

CONTRACTING PROCESS

An RFSQ was issued on January 15, 2010 soliciting SOQs from firms with demonstrated experience providing consulting in the area of Process Improvement. Minimum requirements were detailed for submission of SOQ, including: 1) a summary of relevant background information about the firm including the number of years of experience providing Process Improvement services; 2) a detailed description of the firm's formal Process Improvement methodology; 3) at least three examples of performance metrics and/or benchmarks developed or utilized by the firm to assist County or other public entities in evaluating its performance before and after engagement.

The Honorable Board of Supervisors
June 15, 2010
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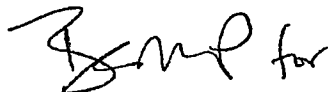
The solicitation was posted on the County's Website and e-mailed to 65 firms. A total of 33 SOQs were received by the February 16, 2010 due date. CEO staff reviewed all SOQs to qualify firms, and we are recommending awarding a Master Agreement to 12 of the 33 firms that submitted SOQs. The remaining firms did not meet minimum requirements, did not provide required documentation, or declined to accept standard County terms and conditions.

Upon Board approval, a master agreement substantially similar to Attachment II, will be mailed to each approved firm for signature. Once the agreements have been fully executed, notice will be provided to all departments of the availability of the Master Agreement list and the procedures for its use.

IMPACT ON CURRENT SERVICES (OR PROJECTS)

Establishment of a Master Agreement List of pre-qualified firms to provide as-needed Process Improvement services will simplify the solicitation and contracting process for those departments that choose to use consultant services to streamline processes and reduce costs. Approval of these actions will enable the departments to perform at a more efficient and effective level, and provide better service to our constituents.

Respectfully submitted,



WILLIAM T FUJIOKA
Chief Executive Officer

WTF:BC:MKZ
FC:ib

Attachments (2)

c: All Department Heads

Process Improvement Services Master Agreement

Proposed Firms

June, 2010

Altmayer Consulting, Inc.
Christina Altmayer, President
600 Carroll Way
Pasadena, CA 91107

Matrix Consulting Group
Richard Brady, President
721 Colorado Avenue, Suite 101
Palo Alto, CA 94303

Arroyo Associates, Inc.
Nicholas Conway, President
3452 E. Foothill Blvd., Suite 910
Pasadena, CA 91107

MTG Management Consultants, LLC
Joseph D.K. Wheeler, CEO
1111 Third Avenue, Suite 3010
Seattle, WA 98101

Cambria Solutions
Diana Lee, L.A. Practice Lead
515 S. Flower Street, 36th Floor
Los Angeles, CA 90071

The Resources Company
Davis R. Schwartz, Senior Principal
560 Dewey Blvd.
San Francisco, CA 94116-1427

CCI – Human Capital Consulting, Inc.
Diane Sanders, Managing Partner
6601 Center Drive West, Suite 500
Los Angeles, CA 90045

Strategica
David Howe, President
704 228th Avenue NE, #415
Sammamish, WA 98074

GCAP Services, Inc.
Ed Salcedo, President
3525 Hyland Avenue, Suite 260
Costa Mesa, CA 92626

ThirdWave Corporation
Roy Hernandez, President/CEO
11400 W. Olympic Blvd., Suite 200
Los Angeles, CA 90064

Huskey & Associates
Bobbie L. Huskey, President
1417 W. Berteau Avenue
Chicago, IL 60613

Woolpert
Scott Cattran, Vice President
116 Inverness Drive East, Suite 105
Englewood, CO 80112-5125

**GUIDELINES FOR
CONTRACTING WITH MASTER AGREEMENT FIRMS FOR
AS-NEEDED PROCESS IMPROVEMENT SERVICES**

This document provides a step-by-step process for utilizing consultants included on the Chief Executive Office (CEO) Master Agreement List for as-needed process improvement services. The competitive process described below does not preclude a County department from awarding a project directly to a specific Master Agreement firm when it is in the County's best interest; however, such an award requires a well-substantiated sole source justification.

STEP ONE: REVIEW MASTER AGREEMENT FIRMS' QUALIFYING PROPOSALS

Copies of each Master Agreement firms' qualifying proposal are available for review to assist departments in determining which Master Agreement firm to solicit for proposals that might best meet specific needs. Departments may review proposals by contacting the Master Agreement Program Administrator:

Jerry Ramirez
Chief Executive Office
750 Kenneth Hahn Hall of Administration
500 West Temple Street
Los Angeles, CA 90012
Phone: (213) 974-4282
E-mail: jramirez@ceo.lacounty.gov

STEP TWO: ISSUE REQUEST FOR SERVICES (RFS)

The contracting department is required to issue an RFS to at least three Master Agreement firms determined appropriate for the specific project. Exhibit A provides an RFS template. Firms should be given three to six weeks after the issue date to submit proposals for the project, depending on the complexity of the request.

STEP THREE: SELECTION EVALUATION

Contracting department representatives (and other County departments, if necessary), must evaluate the RFS responses based on criteria included in the RFS (Part III of Exhibit A), and adhere to the following:

- Fully document the evaluation and selection process and consider the lowest cost proposal. If selected firm does not represent the lowest cost, the department must fully document the reasons for the alternate selection.
- Provide notice to the Master Agreement firms not selected, including debriefing and protest procedures..

STEP FOUR: SELECTION OF MASTER AGREEMENT FIRM

Once Master Agreement firm is selected, the contracting department must complete and submit the following to the above Master Agreement Program Administrator for review and approval:

- Work Order package (Exhibit B),
- Master Agreement Checklist (Exhibit C), and
- Evaluation materials from Step Three.

Please Note: For Work Orders in excess of \$300,000, the contracting department must provide written notice to the Board of Supervisors (Exhibit D), copying the CEO, one week in advance of submitting the Master Agreement Checklist to the CEO for approval.

STEP FIVE: EXECUTION OF WORK ORDER AND PURCHASE ORDER

Once the Work Order is approved by the CEO, department must send all documents to Internal Services Department (ISD) requesting the issuance of a Purchase Order (PO) up to the budgeted project amount.

Please note:

- Any additional services will require prior written approval from the CEO, as well as any amendment to the Work Order and the corresponding PO.
- Contracting department will send an "information only" copy of the PO, and any amended PO to the Master Agreement Program Administrator, at the address indicated above.
- Purchase Order must be issued before any services are provided by the vendor.

STEP SIX: PERFORMANCE AND SERVICES EVALUATION

The contracting department is required to:

- Monitor contractor performance and keep the contractor informed of satisfactory and unsatisfactory performance, consistent with the Master Agreement and the Work Order; and
- At the conclusion of the contractor's project services, complete the Services Evaluation Form (Exhibit E) and send it to the Master Agreement Program Administrator.

**REQUEST FOR SERVICES NO. [XX]
Issued under CEO Master Agreement for
As-Needed Process Improvement Services**

Project Title: *[Enter department's specific project title for Process Improvement Services]*

County Department: *[department name]*

Date of Issuance: *[date of issuance]*

Response Due Date and Time: *[date and time of proposal due date]*

Bidders/Proposers shall submit *[state number of originals and copies]* of the response to this Request for Services in the format prescribed herein and clearly marked "Response to Request for Services No. _____," addressed to:

*[Name of Project Director]
[Title]
[Department Name]
[Address]
[City, State, and ZIP Code]*

Late proposals and proposals not prepared and submitted in the prescribed format and addressing the required content may, at the sole discretion of the County of Los Angeles, be rejected without further consideration.

Target Project Date: *[anticipated project start date]*

Bidders/Proposers' Questions

Bidders/Proposers may submit written questions regarding this Request for Services by e-mail to the contact identified below:

*[Name of RFS Contact]
[Title]
[E-mail address]*

Questions may also address concerns that the application of minimum requirements, evaluation criteria and/or business requirements would unfairly disadvantage bidders/proposers or, due to unclear instructions, may result in the County not receiving the best possible responses from bidder/proposer.

Deadline for submitting questions: *[state date and time of deadline]*

PART I - PROJECT SCOPE OF SERVICES

A. DEPARTMENT BACKGROUND

[Provide a brief description of the department, its mission and major programs/functions, size, budget, etc.]

B. SERVICES REQUESTED

[Describe the services requested clearly and concisely. All products to be delivered under the proposed contract shall be stated, including any acceptance criteria. The requirements shall include descriptions, numbers and formats for oral and/or written reports, as well as the expected period of performance.]

PART II – PROPOSAL RESPONSE REQUIREMENTS

A bidder's/proposer's response to this Request for Services shall include each of the following in the prescribed format and order:

- A. COVER PAGE identifying the Request for Services by title and number, firm name and address, the name, telephone number, fax number and e-mail address of the person authorized to make representations for the bidder/proposer during negotiations and commit the bidder/proposer to a contract.
- B. TABLE OF CONTENTS with all proposal pages numbered.
- C. WORK PLAN that presents the bidder's/proposer's detailed approach or methodology to complete the project. The Work Plan should include the basic elements of the project and include sufficient detail to enable the County to:
 - 1. Determine if the bidder/proposer has a good understanding of the project scope, objectives, and deliverables;
 - 2. Evaluate the appropriateness of the proposed procedures and techniques to be used; and
 - 3. Compare the proposed Work Plan with those proposed by other bidders/proposers.

Referenced to or repetition of scope, objectives, and requirements from this Request for Service does not constitute a "good understanding" of the project. Complete, yet concise, supplementary procedures, methods, explanations, and descriptions are also required to make possible the County's evaluation as to the bidder's/proposer's understanding.

D. PERSONNEL including:

1. A list/chart specifically identifying the bidder's/proposer's Contract Manager, the Project Manager, and other key individuals, including any subcontractors proposed for the project. A bidder/proposer must assign personnel who collectively possess the background and experience necessary to successfully complete this project.
2. A resume for each assigned staff/subcontractor that includes project descriptions and other evidence, demonstrating the special skills and ability to successfully perform the required services.

E. BIDDER/PROPOSER EXPERIENCE AND CAPABILITIES describing:

1. Previous engagements with County departments and other agencies that demonstrate the bidder's/proposer's ability to perform the services requested; and
2. Quantifiable outcome of these previous engagements, if applicable.

F. SCHEDULE OF PROJECT COSTS identifying the bidder's/proposer's personnel/subcontractor costs, and the maximum total cost to complete the project.

The Schedule of Project Costs must include the hourly rate, number of hours, and total cost for each proposed staff/subcontractor, or the fixed rate for a specific service module/deliverable. Job classifications of other personnel participating in the project should be identified, and the total number of hours, the hourly rate and the total cost should be shown by classification. Hourly rates should not exceed those in the Fee Schedule of the bidder's/proposer's Master Agreement. Other expenses (in addition to the hourly personnel cost) that will be incurred and billed must be specifically identified and included in the total cost of completing the project.

Proposals that do not clearly indicate the maximum total cost to complete the project may, at the discretion of the County, be rejected.

G. TIMETABLE or chart for hours and dates to complete the project including number of hours for each of the basic elements of the Work Plan and the dates of the proposed deliverables.

The specified dates should assume that the selected bidder/proposer would be notified by *[specify date]*, but could not begin before *[specify date]*.

[The following section is optional and only required when Professional Liability/Errors and Omissions insurance is deemed needed for this RFS. Consult with your department's or CEO's Risk Management personnel for guidance]

- H. WILLINGNESS TO PROVIDE ADDITIONAL INSURANCE. The County has determined that to perform the services requested in this Request for Services, bidder/proposer shall furnish Professional Liability/Errors and Omissions insurance prior to issuance of Work Order award, covering contractor's liability arising from or related to performing this service, with limits of not less than \$1 million per claim and \$2 million aggregate. Further, contractor understands and agrees it shall maintain such coverage for a period of not less than three (3) years following the termination or cancellation of the Work Order.

PART III – SELECTION PROCESS

A. EVALUATION CRITERIA

Department shall comply with the County's Board of Supervisors Policy 5.054, Evaluation Methodology for Proposals, to ensure a consistent process for the evaluation of proposals. The proposals are evaluated and scored by a panel based on several factors, such as qualifications, experience, work plan, and price.

The Informed Averaging method, as further described in the Evaluation Methodology for Proposals Implementation Guidelines, requires that evaluators independently review and score each proposal using the rating factors included in the individual evaluation worksheet. Evaluators then meet as a group to discuss, and following such discussion, may individually determine if they wish to change any scoring based on the discussion. The basis for any changes in an individual evaluator's score shall be documented in the individual evaluation worksheet. All individual evaluators' scores shall be compiled in a final evaluation worksheet and are averaged to complete the evaluation process. All evaluator written notes must be included on the individual evaluation worksheets and/or the final evaluation worksheet.

Department shall retain the individual evaluation worksheets and the final evaluation scoring worksheet signed by each evaluator (Evaluation Documents) consistent with the Countywide Record Retention Schedule for contracts as approved by the Board of Supervisors. There will be no discarding, shredding, or other destruction of Evaluation Documents pending the expiration of the applicable retention period per the retention schedule referenced above. All evaluator written notes must be included on the individual evaluation worksheets and/or the final evaluation worksheet.

Proposals will be evaluated on the thoroughness, appropriateness, and innovativeness of the approach detailed in the Work Plan (___%); the experience of the staff to be assigned to the project (___%); the estimated hours and time period for completion (___%), and the cost of performing the service (___%).

Subsequent to the above evaluations of the proposals, at the sole discretion of the County, the highest rated firms may be requested to meet with the Project Evaluation Committee to answer questions and provide more evidence of their qualifications. The evaluators will consider the results of these interviews in their ratings of the proposals.

B. WORK ORDER

Upon completion of negotiations with the highest rated bidder/proposer (Recommended Proposer), the County department shall obtain a Letter of Intent from an authorized officer of the Recommended Proposer that the negotiated Work Order is a firm offer of the Recommended Proposer, which shall not be revoked by the Recommended Proposer pending the County department's completion of the Protest and Review Process (described below) and CEO approval.

When selected to perform the requested services, the Recommended Proposer and the County will sign a Work Order in a format substantially the same as Exhibit D to the Process Improvement Services Master Agreement.

Additional Notice to Bidders/Proposers

Notice To Bidders/Proposers Regarding The Public Records Act

1. Responses to this Request for Services shall become the exclusive property of the County. Absent extraordinary circumstances, at such time as (a) with respect to the recommended bidder's/proposer's proposal, *[insert department]* completes Work Order negotiations and obtains a letter from an authorized officer of the recommended bidder/proposer that the negotiated Work Order is a firm offer of the recommended bidder/proposer, which shall not be revoked by the recommended bidder/proposer pending the department's completion of the Request for Services process and approval by the Chief Executive Office and (b) with respect to all other bidders/proposers, *[insert department]* recommends the recommended bidder/proposer(s) to the CEO, bids/proposals submitted in response to this Request for Services become a matter of public record, with the exception of those parts of each bid/proposal which are justifiably defined by the bidder/proposer as business or trade secrets, and plainly marked as "Trade Secret," "Confidential," or "Proprietary."
2. The County shall not, in any way, be liable or responsible for the disclosure of any such record or any parts thereof, if disclosure is required or permitted under the California Public Records Act or otherwise by law. A blanket statement of confidentiality or the marking of each page of the bid/proposal as confidential shall not be deemed sufficient notice of exception. The bidders/proposers must specifically label only those provisions of their respective bid/proposal which are "Trade Secrets," "Confidential," or "Proprietary" in nature.

Protest and Review Process

Requirements Review

Any prospective bidder/proposer may request a review of the requirements under this Request for Services. Such requirements review request must be submitted by e-mail to the contact below no later than ***[insert date]***:

[Name of departmental contact]
[Title]
[E-mail address]

Requirements Review Request shall be reviewed by the department, and its determination shall be provided to the requesting person or entity, via e-mail, within a reasonable time prior to the bid/proposal due date.

Proposal Review

Subsequent to the bid/proposal evaluation by County, any actual bidder/proposer, upon notification by County department that the department is entering negotiations with another bidder/proposer who is the highest rated bidder/proposer, may request a review of the proposed Work Order award under such Request for Services, including a debriefing of the requesting bidder/proposer's score sheet, as well as the highest rated bidder/proposer's score sheet and proposal, if so requested. Such Proposal Review Request shall be submitted by e-mail within **five (5) calendar days** of County's notification, to the contact below:

[Name of departmental contact]
[Title]
[E-mail address]

Upon completion of negotiations with the highest rated bidder/proposer (Recommended Proposer), the County department shall obtain a Letter of Intent from an authorized officer of the Recommended Proposer that the negotiated Work Order is a firm offer of the Recommended Proposer, which shall not be revoked by the Recommended Proposer pending the County department's completion of the Protest and Review Process and CEO approval. Once the Letter of Intent is obtained, the County department shall contact the Proposal Review requestor within five (5) calendar days after receipt of Letter of Intent from Recommended Proposer, to arrange the Proposal Review.

Work Order Award Protest

Subsequent to the proposal review process, the bidder/proposer may file a protest, in writing (e-mail not acceptable) and postmarked no later than **five (5) calendar days** of

the proposal review meeting conducted by County, to the following departmental contact:

*[Name of departmental manager with services
contracting knowledge and experience who is not
participating to a substantial degree in this RFS]
[Title]
[Department Name]
[Address]
[City, State, and ZIP Code]*

Under any such protest, it is the responsibility of the bidder/proposer challenging the decision of a County department to demonstrate that the department committed a sufficiently material error in the Request for Services process to justify invalidation of a Request for Services or a proposed Work Order award, as the case may be.

Upon receipt of the timely protest request, the department shall convene a panel designated by the department's senior management, consists of members not involved in the issuance or the evaluation of proposals under this Request for Service, to review the requestor's claim. The panel may ask the requestor to provide additional documentation and/or present oral arguments if deemed necessary. The panel shall then issue a written decision to the requestor.

Throughout the protest and review process, the County has no obligation to delay or otherwise postpone an award of Work Order based on a bidder/proposer protest. In all cases, the County reserves the right to make an award when it is determined to be in the best interest of the County of Los Angeles to do so.

**Los Angeles County
Process Improvement Master Agreement
Work Order Form Template**

Project Title _____

Department _____

RFS No. _____ Work Order No. _____

Effective Date _____ Purchase Order No. _____

Expiration Date _____ Total Maximum Amount _____

Invoice shall be sent to the following County address:

Name
Division
Department Name
Address
City, Zip

I. SIGNATURES

Contractor's Project Manager _____ DATE

Contractor's Authorized
Official _____ DATE

Department Project Manager _____ DATE

II. BUSINESS OBJECTIVE and EXPECTED OUTCOME
III. PROJECT OVERVIEW
IV. PROJECT SCOPE
V. STATEMENT OF WORK <i>(including detailed Project Plan, Tasks, Milestones, Deliverables, and Acceptance Criteria)</i>
VI. PROJECT SCHEDULE
VII. PAYMENT SCHEDULE

**Los Angeles County
Process Improvement Master Agreement
Work Order Deliverable Acceptance Form (Optional)**

Project Title _____

Department _____

Work Order No. _____ Effective Date _____

Purchase Order No. _____

[illegible]

SIGNATURES

Contractor's Project Manager _____ DATE _____

Department Project Manager _____ DATE _____

Process Improvement Services Master Agreement Checklist

Department: _____ Project Title: _____

Consultant: _____ RFS Number: _____

Master Agreement Process Requirements	Completed
1. Request for Services (RFS) was sent to at least three Master Agreement firms. Copy of RFS and names of firm has been provided to Master Agreement Program Administrator.	<input type="checkbox"/>
2. Department received and evaluated vendors' Master Agreement proposals based on criteria included in the RFS. Copy of evaluation results have been provided to the Master Agreement Program Administrator.	<input type="checkbox"/>
3. Department has compiled documentation of evaluation and selection process. Copy of documentation has been provided to the Master Agreement Program Administrator.	<input type="checkbox"/>
4. If the vendor selected did not represent the lowest cost, Department fully documented the reasons for the alternate selection.	<input type="checkbox"/>
5. Department notified vendors of Master Agreement evaluation results. Copy of notification letters have been sent to the Master Agreement Program Administrator.	<input type="checkbox"/>
6. Department completed the Protest and Review Process as indicated in the RFS, with all bidders/proposers. Provide a chronological listing of requirements review, proposal reviews, and protest including outcomes to the Master Agreement Program Administrator.	<input type="checkbox"/>
7. Department completed Work Order form and the selected vendor has signed. Copy of Work Order has been provided to Master Agreement Program Administrator.	<input type="checkbox"/>
8. For Work Orders in excess of \$300,000, Department has provided written notice to the Board of Supervisors, copying the Chief Executive Office (CEO), one week in advance of submitting the Master Agreement Checklist for CEO approval. Copy of notice has been provided to the Master Agreement Program Administrator.	<input type="checkbox"/>

The Department has met the Master Agreement Process Requirements and is authorized to submit Work Order requesting the issuance of a Purchase Order from Internal Services Department up to the budgeted project amount. The Work Order must include a copy of this signed document, along with evaluation and selection documentation to Internal Services Department prior to issuance of Purchase Order. No services are to be provided by the vendor prior to issuance of a Purchase Order.

Assistant Chief Executive Officer

Date

<USE DEPARTMENT LETTERHEAD>

<Date>

TO: Each Supervisor

FROM: <Department Head Name>
<Department Head Title>SUBJECT: **NOTICE OF INTENT TO ISSUE WORK ORDER EXCEEDING \$300,000
UNDER THE MASTER AGREEMENT FOR AS-NEEDED PROCESS
IMPROVEMENT SERVICES**

This is to advise your Board of our intent to request the Chief Executive Office (CEO) to execute a Work Order under the Master Agreement for As-Needed Process Improvement Services (Master Agreement), with <Firm Name> in the amount of <Work Order Amount>. The period of performance for the Work Order is <Period>. In accordance with established Master Agreement guidelines, prior Board notice is required for projects that will exceed \$300,000.

BACKGROUND

Provide the overall need for the service. Describe your department's operations as they relate to the proposed service in the area of process improvement.

SCOPE OF WORK

Provide a description of proposed services to be provided. Include deliverables and timeline.

SELECTION PROCESS

Describe the selection process – when it was conducted, how many vendors responded, evaluation criteria, and which vendor was selected and why.

FISCAL IMPACT

Indicate the amount of the Work Order and the funding source(s).

NOTIFICATION TIMELINE

Consistent with the policy and procedures for the Master Agreement for As-Needed Process Improvement Services, we are informing your Board of our intention to execute the above mentioned Work Order. If no objection is received from your Board within

one (1) week of this filing, we will submit the Work Order request to CEO for review and approval.

If you have any questions or need additional information, please contact me at <Department Head Phone Number>, or your staff may contact <Staff Name, Phone Number, E-mail Address>.

c: <Name of Assistant Chief Executive Officer overseeing the Master Agreement>, Chief Executive Office

SERVICES EVALUATION
MASTER AGREEMENT FOR AS-NEEDED PROCESS IMPROVEMENT SERVICES

Master Agreement Firm Name:	
Services Provided:	
Contracting Department:	
Department Project Manager:	Telephone:
Evaluation Period From:	To:

QUALITY OF SERVICE	LEAVE BLANK IF NOT APPLICABLE
Was the quality of service as specified in the contract delivered?	Yes <input type="radio"/> No <input type="radio"/>
Were any quality discrepancies noted?	Yes <input type="radio"/> No <input type="radio"/>
If so, were these discrepancies significant?	Yes <input type="radio"/> No <input type="radio"/>
TIMELINESS	
Did the contractor meet timelines and dates for contract requirements?	Yes <input type="radio"/> No <input type="radio"/>
Did the contractor submit all required reports in a timely manner?	Yes <input type="radio"/> No <input type="radio"/>
AVAILABILITY	
Did the contractor respond in a timely manner when problems arose?	Yes <input type="radio"/> No <input type="radio"/>
CORRECTIVE ACTION	
If there were any discrepancies, did the contractor correct them in a timely manner?	Yes <input type="radio"/> No <input type="radio"/>
Were there any issues not resolved?	Yes <input type="radio"/> No <input type="radio"/>
COMPLETENESS	
Did the contractor complete the contractual terms as outlined in specifications?	Yes <input type="radio"/> No <input type="radio"/>
PERSONNEL	
Were there any known violations of contract wage requirements?	Yes <input type="radio"/> No <input type="radio"/>
Were there any safety violations?	Yes <input type="radio"/> No <input type="radio"/>
PROFESSIONALISM	
Did the contract conduct themselves in a professional manner?	Yes <input type="radio"/> No <input type="radio"/>
INSURANCE	
Did the contractor maintain appropriate insurance required by the contract throughout the contract period?	Yes <input type="radio"/> No <input type="radio"/>
OVERALL RATING	
Is the person rating this contractor familiar with the contractor's performance?	Yes <input type="radio"/> No <input type="radio"/>
Would you recommend this contractor for another project?	Yes <input type="radio"/> No <input type="radio"/>